

Contract Creation Process

Part 1 – Pricing Negotiation Process

1. Post RFP (PM)
2. Review proposals (PM)
3. Select vendor (PM)
4. Request activity list for each deliverable, from vendor (PM/Contract Specialist)
5. Decide which activities aren't needed (PM)
6. Negotiate/agree upon a price for each activity/deliverable (PM/Contract Specialist w/vendor)
7. Final agreement/decision on pricing (PM/Sponsor)

Part 2 – Create, View & Process RFP

- Technical RFP over 10-15K needs CIO approval
 - A. Create IT RFP
 - B. Contract & Procurement Specialist Reviews IT RFP
 - C. Additional DII Reviewers
 - D. CIO Signature
 - E. RFP Completion-Contract Specialist emails sent out to Sponsor / BGS/ EPMO'
 - F. RFP Posted by BGS
 - G. RFP Q & A monitored by DII Daily

Part 3 – if under \$150,000 go to Part 4

*if over \$500,000 – need Independent Review – Contract & Procurement Specialist

Write RFQ to solicit a reviewer

- a. Overview from RFP
 - b. Change Dates
 - c. Change any other info-updates
 - Contents – right click to update fields
 - Also change properties for name
 - Header/Footer
 - d. Review RFQ line by line 3 times
 - e. Send link to EPMO Dir for approval if needed
 - f. Once approved-convert to PDF
 - g. Review PDF line by line 3 times for errors
- B. Post RFQ
- a. Send Vendor 1 by 1 w/PDF and copy EPMO Dir
 - b. Send e-mail to dept notifying them that RFQ was sent out to bid
- C. If no bids come in from Vendors, step A. starts over and new dates are put into RFQ – which also could have change on start date.
Let department know what is going on and everything is delayed.
- D. Confirmation via e-mail to Vendors who sent Bids

- E. Review proposals
- F. Select Independent Review vendor
 - a. Utilize Sponsor in Review Process
 - b. State Reviewers fill out review form
 - c. Select Vendor in accordance with State Guidelines(Best Interest for the State)
 - 1. Length of proposed work schedule
 - 2. Cost
 - 3. Prior experience with this type of review process
 - 4. Technical Proposal Content
 - 5. Price Proposal Content
 - d. confirmation from EPMO and/or Deputy Commissioner
- G. Vendor Notifications
 - a. Notify Vendor of Award via e-mail
 - b. Notify Vendors not getting award of decision that they did not get contract
 - c. Notify via e-mail to dept of Independent Review of Vendor decision
 - d. Copy send also to EPMO Director/Deputy Commissioner/CIO/Business Mgr
- H. IR Contract execution
 - a. Contract drawn up by Contract & Procurement Specialist and Business Mgr gets contract number from Vision
 - b. CIO or Deputy Commissioner signs contract
 - c. Vendor signs contract as soon as possible
- I. Vendor executes Independent Review with Contract & Procurements Specialist help as needed
- J. Vendor reviewer requests meeting with CIO for presentation
 - a. Vendor reviews report with CIO & Contract & Procurements Specialist and EPMO Dir
 - b. CIO approves/declines timeline for project.
 - c. Project Summary could have recommendations that the CIO would need to decline or re-align things with Department on project.
- K. Contract & procurement Specialist makes template document of Summary to track needed points that need reviewing
- L. Vendor sets up meeting to review proposal with Dept doing Project
- M. Copies and final CD given to EPMO group and filed
- N. Final Bill given to Billing Group within DII
- O. Summary Point resolution w/CIO and EPMO

*if over \$150,000 – need Cost/Benefit analysis (should have for every project before obligation of funds for project) – PM

- 1. EPMO provides template
- 2. Business sponsor with assistance of Business Analyst completes documentation
- 3. Analysis is provided to CIO
- 4. CIO approves/declines project

Part 4 – Contract / Amendment Review Process (Contract & Procurements Specialist is responsible for IT contract creation if doing for sponsor or DII)

1. Draft copy of contract/Amendment
2. Sole Source and Amendments should have proper documentation
3. Send to PM for review-review Cost Benefit Analysis
4. Send to vendor to ensure there are no concerns with boiler plate language
5. Send to BGS for review
6. Send to AGs office for review
7. Send to Sponsor for review
8. All technology Contracts should come through to CIO for Approval 1st

Part 5 – Contract / Amendment Signature Process, follow bulletin 3.5 guidelines for signatures

1. Finalize contract [for conformance with Vermont contract requirements](#) – AA14 (from feedback, Part 3)
2. If Part 3 is being done, Contract cannot be signed until Independent Review is CIO Approved
3. Contract is formulated and sent to Finance and Management who logs contract, forwards to DII/CIO for signature on AA-14. Contract is forwarded to AG and Secretary of Admin (they also track the document throughout this process). The cost threshold through Bulletin 3.5 is used for Agencies that need to sign off.
4. Send contract to vendor for signature
5. State Sponsor signs contract
6. Contract is filed for retention